

KEY INFORMATION SUMMARY SHEET

STATE OF MARYLAND

DEPARTMENT OF GENERAL SERVICES

PROJECT NO. DGS-CE-001

**COORDINATING ENTITY FOR CERTIFIED SHELTERED WORKSHOPS
SELLING ENTITY**

Issue Date: September 21, 2004

Issuing Office: Department of General Services

Procurement Officer: Myrna L. Harris
Division of Procurement & Logistics
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Baltimore, MD 21201
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Procurement Method: Competitive Sealed Proposals (RFP)
(COMAR 21.05.03)

Pre-Proposal Conference: October 1, 2004

Proposals are to be sent to: Department of General Services
Office of Procurement and Logistics
301 West Preston Street, Room M-7
Baltimore, MD 21201
Attention: Myrna L. Harris

Closing Date and Time: October 15, 2004 at 11:00 a.m.

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PART I. INTRODUCTION

The State of Maryland, in accordance with the State Finance and Procurement Article (SFP), Section 14-101/14-108, Annotated Code of Maryland, and the Code of Maryland Regulations (COMAR) 21.11.05, provides a procurement preference to Certified Sheltered Workshops (Providers) for various types of contracts throughout the State of Maryland.

SFP 14-108 authorizes the Secretary of General Services to designate a coordinating entity to facilitate the distribution of procurement contracts for supplies and services among Providers.

NOTE: For the purpose of this RFP, the Department of General Services (DGS) uses current Maryland State law terminology. The Department recognizes the terminology used herein may not reflect that terminology currently used or preferred by the disability community.

As used in this RFP and the contract resulting from it, the term “Provider” includes those entities approved by DORS under SFP 14-101 and known as Community Rehabilitation Programs (CRPs).

PART II. SCOPE OF WORK

A. PROJECT DESCRIPTION

The intent of this solicitation is to competitively procure coordinating services from a qualified contractor that has the capabilities and desire to provide assistance to the Providers to fully benefit from contracts awarded on a preference basis. The intent of these preference contracts is to benefit persons with disabilities by providing meaningful work experiences, occupational opportunities, vocational rehabilitation and training, and work therapy.

The contractor (coordinating entity) awarded this contract will be responsible for the duties described in Part II Sections C and D of this solicitation and all other conditions and requirements of this RFP and the contract resulting from it. The coordinating entity shall have no authority or responsibility respecting State Use Industries, Blind Industries and Services of Maryland, or the Maryland Vending Facilities Program for the Blind.

B. CURRENT CONDITION

The coordinating entity coordinates and distributes preference contracts among Providers. The list of services and commodities currently offered are as

follows, and known as the Master List*, in accordance with COMAR 21.11.05.01.B.(4):

Assembly and Packaging
Delivery Services
Document Imaging: Optical Scanning/Micrographics
Facilities Management
Food Service (Including Cafeteria and catering services)
Janitorial Services
Landscaping/Horticulture Services (Including lawn-mowing)
Mailing
Pest Control
Photocopying
Pressure Washing
Printing
Records Destruction and Recycling
Shrink Wrapping
Snow Removal
Temporary Services
Wood Stakes

* Current list is subject to modifications

The total anticipated number of awards with their approximate aggregate value for the next five (5) years are as follows:

<u>YEAR-AWARDS</u>	<u>APPROX. VALUE</u>
2005 — 120	\$ 7,000,000.00
2006 — 130	\$15,000,000.00
2007 — 140	\$16,000,000.00
2008 — 150	\$30,000,000.00
2009 — 150	\$30,000,000.00

These numbers are nonbinding estimates only. The State does not warrant the number of awards or dollar value of awards to any Provider or to all Providers collectively for any year or for all years. Fees payable to the coordinating entity as a result of this contract shall be payable by each Provider receiving a contract award as a result of a preference accorded under SFP 14-103(3). The State of Maryland and its departments, units, and agencies shall have no liability to the coordinating entity for any fees or other costs or expenses of performing this contract. The coordinating entity's fee for this contract shall be based on a percentage of the actual value of the contracts for the year 2005.

C. RESPONSIBILITIES OF THE COORDINATING ENTITY

The duties of the coordinating entity consist of the following:

1. Assist potentially eligible Providers in the registration process and eligibility requirements
2. Provide technical assistance to **all** eligible Providers in the preparation and execution of contracts
3. Notify each eligible Provider of every contract pertaining to products or services listed on the Certified Sheltered Workshops' current list of offered services and notify the requesting agency of acceptance or waiver of the contract by each Provider within fifteen (15) days after receiving the contract specifications.
4. Ensure provider compliance with all Federal and State laws and regulations.
5. Monitor and report provider performance on contracts annually.
6. Ensure no preferential treatment will be given or no partiality will be shown in the distribution of contracts.
7. Establish fair market prices for the variety of services necessary to supply pricing to the Pricing and Selection Committee for approval.

D. REPORTING REQUIREMENTS

The coordinating entity shall submit a bi-annual summary to the Secretary of DGS, due fifteen (15) days after the first six (6) months of the contract period and fifteen (15) days after the end of the contract period. The summary shall include the following:

1. SELLING ENTITIES

- a. The names of each Provider awarded a contract during the reporting period
- b. The number of contracts and contract values awarded to each Provider during the reporting period.
- c. The percentage of direct labor hours performed by individuals with disabilities on awarded contracts during the reporting period.
- d. The percentage of supervisory labor hours performed by individuals with disabilities on awarded contracts during the reporting period.
- e. The number of individuals with disabilities that have been placed in private sector positions during the time period, including individual names, name of the provider, name of employer, type of position, and starting salary.
- f. List of contracts that are waived, including the amounts and justification

2. COORDINATING ENTITY

- a. All positions used to fulfill the coordinating duties as required by this contract.
- b. Titles of employees holding each position
- c. Salary for each position
- d. Positions held by individuals with disabilities

The State reserves the right to periodically audit company records to verify compliance with these requirements.

PART III. GENERAL SOLICITATION INSTRUCTIONS/INFORMATION

- A. This procurement is being conducted in accordance with COMAR 21.05.03 "Procurement by Competitive Sealed Proposal". Both the Technical and the Price will be evaluated by a committee organized for that purpose.
- B. Award will be made to the responsible offeror whose proposal is determined to be the most advantageous to the State considering Price and Technical evaluation factors set out in this request for proposal, with greater emphasis on the Technical Proposal.

Award of this contract by DGS will not be final and complete until after: (1) a proposed award is approved by DGS, and/or the Board of Public Works; and (2) the offeror submits complete and satisfactory documentation required under the contract.

- C. The term of this Contract is for a one (1) year period beginning January 1, 2005 through December 31, 2005. The State reserves the option to extend contract for two (2) one (1) year renewal options.
- D. A Pre-Proposal Conference will be held on October 1, 2004 at 11:00 a.m. in Room L-1, 201 W. Preston Street, Baltimore, Maryland 21201. Attendance at the Pre-Proposal Conference is not mandatory, but all interested Offerors are encouraged to attend in order to facilitate better reparation of their proposals. In addition, attendance may facilitate the Offeror's understanding of RFP requirements.

A copy of the minutes of the Pre-Proposal Conference will be made available to all prospective offerors who were sent this RFP or otherwise are known by the Procurement Officer to have obtained this RFP.

In addition, as promptly as is feasible subsequent to the Conference, a summary of the Pre-Proposal Conference and all questions and answers known at that time will be distributed, free of charge, to all prospective offerors who were sent this

RFP or otherwise are known by the Procurement Officer to have obtained a copy of this RFP.

In order to assure adequate seating and other accommodations at the Pre-Proposal Conference, it is requested that **by September 27, 2004**, all potential Offerors planning to attend, call the Procurement Officer at 410-767-0979 with such notice. In addition, if there is a need for sign language interpretation and/or other special accommodations due to a disability, it is requested that at least five days advance notice be provided.

E. Use of “eMaryland Marketplace”

The RFP and associated materials, the solicitation and minutes of the pre-proposal conference, Offeror questions and Department responses, addenda, and other solicitation related information will be available via e-Maryland Marketplace (EMM). EMM is an electronic commerce system administered by the Maryland Department of General Services. In addition, the RFP and related documents will be available on the Department of General Services’ web site (URL). It is the responsibility of the Offeror to obtain all contract modifications and other associated materials via EMM and the DGS website.

All such information is immediately available to subscribers to EMM. Because of the instant access afforded by EMM, it is recommended that all contractors interested in doing business with Maryland State agencies subscribe to EMM.

Depending on the desired level of service, the annual subscription costs are \$150 or \$225. Information, including on-line subscription access, can be obtained at the e-Maryland Marketplace website at <http://www.emarylandmarketplace.com>.

F. All questions regarding this RFP shall be directed to the Procurement Officer. The Procurement Officer will accept written questions prior to the pre-proposal conference. If possible and appropriate, such questions will be answered at the pre-proposal conference. (No substantive question will be answered prior to the pre-proposal conference.) Questions may be submitted by mail, facsimile, or preferably by e-mail to the Procurement Officer. Questions, both oral and written, will also be accepted from prospective Offerors attending the Pre-Proposal Conference. If possible and appropriate, these questions will be answered at the Pre-Proposal Conference.

Questions will also be accepted subsequent to the Pre-Proposal Conference by the Procurement Officer until October 8, 2004. Questions received after October 8, 2004 will be answered based on the availability of time to research and communicate an answer before the the proposal due date. Answers to all substantive questions that have not previously been answered, and are not clearly specific only to the requestor, will be distributed to all prospective offerors who were sent this RFP or otherwise are know by the Procurement Officer to have

obtained a copy of this RFP.

- G. Proposals must be received by the Procurement Officer, at the address listed, no later than October 15, 2004 at 11:00 a.m. in order to be considered. It is the responsibility of the offeror to ensure receipt of the proposal to the Procurement Officer by the due date and time. Offerors mailing proposals should allow sufficient mail delivery time to ensure timely receipt by the Procurement Officer. Except as provided in COMAR 21.05.02.10, proposals received by the Procurement Officer after the due date and time will not be considered and will be returned unopened. Proposals shall not be submitted by email or facsimile. Proposals will not be opened publicly.
- H. Proposals submitted in response to this RFP are irrevocable for 90 days following the proposal due date. This period may be extended only with the offeror's written agreement.
- I. If it becomes necessary to revise this RFP before the due date for proposals, amendments will be posted on EMM and the DGS website. Offerors must acknowledge receipt of all amendments to this RFP in the transmittal letter accompanying the Technical Proposal submittal. Failure to acknowledge receipt of amendments does not relieve the Offeror from complying with all terms of all amendments.
- J. The State reserves the right to cancel this RFP, accept or reject any and all proposals, in whole or in part, received in response to this RFP, to waive or permit cure of minor irregularities, and to conduct discussions with all qualified or potentially qualified offerors in any manner necessary to serve the best interests of the State of Maryland. The State also reserves the right, at its sole discretion, to award a contract based upon the written proposals received without prior discussions or negotiations.

The benefits and obligations hereunder will inure to and be binding upon the parties hereto and, except as provided in COMAR 21.05.02.24, neither this contract nor the services to be performed hereunder will be subcontracted, or assigned, either in whole or in part, except with the prior written consent of the Procurement Officer.

- K. The State will not be responsible for any costs incurred by an Offeror in preparing and submitting a proposal or in performing any other activities relative to this RFP. Multiple or alternate proposals will not be considered.
- L. Registration - Pursuant to §7-201 et seq. of the Corporations and Associations Article of the Annotated Code of Maryland, corporations not incorporated in the State will be registered with the State Department of Assessments and Taxation, 301 West Preston Street, Baltimore Maryland 21201, before doing any interstate or foreign business in this State. Before

doing any intrastate business in this State, a foreign corporation will qualify with the Department of Assessments and Taxation.

Any offeror not certain as to their status should contact the Comptroller's Office, Ms. Victoria Stultz, at 410-767-1908.

It is strongly recommended that any interested offeror be completely registered prior to the due date of the bid. Failure to do so could result in your proposal being deemed unacceptable (not reasonably susceptible of being selected for award).

IV. PROPOSAL FORMAT

Each Offeror is required to submit a separate sealed package for each Proposal, which is to be labeled "Technical Proposal" and "Price Proposal". Each sealed package must bear the RFP title and number, name and address of the Offeror, and proposal (Technical or Price), and the closing date and time for receipt of the proposals on the outside of the package. Both proposals must be submitted simultaneously to the Procurement Officer (address listed on Information Summary Sheet). An unbound original, so identified, and five (5) bound copies of each proposal are to be submitted.

A. TECHNICAL PROPOSAL CONTENT

1. Transmittal Letter: A transmittal letter must accompany the technical proposal. The purpose of this letter is to transmit the proposal and acknowledge the receipt of any addenda. The transmittal letter should be brief and signed by an individual who is authorized to commit the Offeror to the services and requirements as stated in this RFP. Only one transmittal letter is needed and it does not need to be bound with the technical proposal.
2. Title and Table of Contents: The technical proposal should begin with a title page bearing the name and address of the Offeror and the name and number of this RFP. A table of contents for the technical proposal should follow the title page. Information that is claimed to be confidential is to be placed after the Title Page and before the Table of Contents in the Offeror's Technical Proposal and Price Proposal. Unless there is a compelling case, an entire proposal should not be labeled confidential but just those portions that can reasonably be shown to be proprietary or confidential.
3. Executive Summary: The Offeror shall condense and highlight the contents of the technical proposal in a separate section titled "Executive Summary." The summary shall also identify any exceptions the Offeror

has taken to the requirements of this RFP, the Contract (Attachment A), or any other attachments.

Warning: Exceptions to terms and conditions may result in having the proposal deemed unacceptable (not reasonably susceptible of being selected for award). If an offeror takes no exception to State terms and conditions, the Executive Summary should so state.

4. Offeror Technical Response to RFP Requirements: The Offeror must address each criterion in the technical proposal and describe how the proposed services will meet the requirements as described in the RFP. As stated above, any exception to a term or condition may result in having the proposal deemed unacceptable (not reasonably susceptible of being selected for award).
5. Offeror Qualifications: An offeror shall include information on past experience with similar requirements. Demonstrate how your prior experience, if any, in the following areas, will enable you to fulfill the requirements of the RFP:
 - a. Contract management
 - b. State Government projects
 - c. Disability background
6. Organizational Structure: Offeror shall provide an organization chart showing all major positions in the company that will perform the requirements of this contract and corporate resources that will be available to support this contract in both primary and secondary, or back-up roles. A job description and salary range for each position must also be provided. In addition, the names and titles of key management and any other personnel directly involved with services rendered under this contract along with their resumes must be provided. Disclose the above positions that are held by individuals with disabilities.
7. References: Provide a list of three (3) clients whom you have provided services for within the last five (5) years (see Section V. B. of this RFP for explanation). Each references shall include the following information:
 - a. Name of client organization
 - b. Name, title, and telephone number of point-of-contact for client organization
 - c. Value, type, and duration of contract(s) supporting client organization
 - e. The services provided, scope of the contract, geographic area being supported, and performance objectives satisfied, and improvements made to client systems (e.g. reduction in operation/maintenance costs while maintaining or improving current performance levels).

- f. An explanation of why the Offeror is no longer providing the services to the client organization, should that be the case.
- 8. Financial Capability and Insurance: The Contractor shall include the following:
 - a. Evidence that the Contractor has the financial capacity to provide the services via abbreviated profit and loss statements and abbreviated balance sheets for the last two years.
 - b. Evidence of current insurance, including types and limits of coverage.
- 9. Economic Benefit Factors
 - a. The Offeror shall describe the benefits that will accrue to the State of Maryland economy as a direct or indirect result of the Offeror's performance of the contract resulting from this RFP. The Offeror will take into consideration the following elements (do not include any detail of the financial proposals with this technical information):
 - 1. The estimated percentage of contract dollars to be recycled into Maryland's economy in support of the contract. Contractor should be as specific as possible.
 - 2. The estimated number and types of jobs for Maryland residents resulting from this contract. Indicate job classifications, number of employees in each classification, and the aggregate Maryland payroll percentages to which the contractor has committed.
 - 3. Tax revenues to be generated for Maryland and its political subdivisions as a result of this contract. Indicate tax category (sales tax, inventory taxes and estimated personal income taxes for new employees). Provide a forecast of the total tax revenues resulting from the contract.
 - b. In addition to the factors listed above, the Contractor should explain any other economic benefit to the State of Maryland that would result from the Offeror's proposal.
- 10. Bid/Proposal Affidavit – The Bid/Proposal Affidavit shall be filled out completely. Provide affirmation of Items B. through E. by writing “none” in the space provided. Affidavit must be signed by an authorized representative of the offeror.
- 11. Contract Affidavit – The Contract Affidavit shall be completed and signed by an authorized representative of the offeror.

B. PRICE PROPOSAL CONTENT

- 1. Bid Form - Do not alter or change the Price Proposal Form.

- Alternations may cause the Proposal to be rejected.
2. The fee percentage shall be all inclusive. Tier pricing that results in multiple percentages are not allowed for this contract.
 3. The Price Proposal Form is to be signed and dated by an individual who is authorized to bind the firm to the price offered. Enter the individual's title, name and the company name in the spaces provided.

V. EVALUATION CRITERIA FOR TECHNICAL PROPOSAL

Evaluation of the Technical Proposals will be performed by a committee organized for that purpose. The Technical Proposals will be given an evaluation weighting factor of 60%. The evaluations will be based on the criteria listed below, listed in their relative order of importance (highest to lowest):

A. Executive Summary

The Executive Summary is intended to provide the offeror opportunity to express how he/she intends to accomplish the responsibilities of this contract as stated in Part II, Section C. of this RFP. It is the State's intent to qualify only offerors who can demonstrate that they have the means, capabilities, and willingness to provide new ideas and resources that will contribute to the progress of individuals with disabilities through this program.

Offerors may also use this Executive Summary to identify the means in which they intend to coordinate possible joint ventures among the Providers in order to distribute large (otherwise unobtainable contracts) to the smaller Providers.

B. Qualification and Experience of Offeror

In order to be eligible for consideration of this contract award, an offeror must be a nonprofit organization and must have experience working with individuals with disabilities.

Consideration will be given to the offeror's contract management performance on a minimum of three (3) projects commensurate in size, scope, and complexity to this contract. These projects must have been completed within the last five (5) years.

The offeror must provide references for three (3) clients capable of documenting: 1) offeror's ability to manage contracts of comparable size, scope, and complexity; and 2) the quality and breadth of services provided

by the offeror. Each client reference shall include information as stated in Part IV, Section A.7. – References, of this RFP.

Members of the Evaluation Committee will contact some or all references listed and may contact other owners who may be referred to them in the course of this evaluation. The State reserves the right to contact other resources for references if necessary.

C. Organizational Structure

Provide an organizational chart that includes all major positions in the company that will perform the requirements of this contract. In addition, the names and titles of key management, board members, and any other personnel directly involved with services rendered under this contract, along with their resumes, must be provided. Higher consideration will be given to organizations whose staff consist of individuals with disabilities.

Every offeror must execute and submit with its Technical Proposal the Conflict of Interest Affidavit included with this RFP and otherwise must comply with SFP Section 13-212 and COMAR 21.05.08.08. Any offeror disclosing an actual or potential conflict of interest shall include in its Technical Proposal a detailed statement of what actions it will take to avoid, mitigate, or neutralize the potential for conflict of interest.

By way of example and not of limitation, being a board member or officer of an offeror and of a Provider shall constitute an actual or potential conflict of interest.

During the term of this contract, the coordinating entity will be prohibited from being awarded preference contracts awarded under SFP 14-101 - 14-108 and COMAR 21.11.05.

D. Economic Benefit Factors

The offeror must demonstrate how their contract will benefit the Maryland and local Baltimore City economy (in accordance with COMAR 21.05.03.03). Consideration will be given to the offeror's procurement of suppliers of goods, the number of jobs generated for Maryland residents, and tax revenues generated to Maryland and its political subdivisions.

VI. EVALUATION OF PRICE BIDS

- A. Evaluation of the Price Bids will be performed by a committee organized for that purpose. The Price Bids will be given an evaluation weighting factor of 40%.
- B. Price Bids will not be opened publicly.
- C. The Price Bid form must be completed by stating one all-inclusive percentage of the anticipated value of the contracts for the year 2005 on the line provided. The form must contain all necessary signatures.

Failure to complete the Price Proposal form correctly or any alterations to the Price Proposal form may result in the rejection of the proposal.